



Prospect Research

Prospect research is the process of searching, gathering, analyzing, and synthesizing information from a variety of sources to identify relevant data, including capacity and affinity data that enables organizations to identify donors, supporters, and/or volunteers that might be interested in supporting their work.

The goal of a ViTreo Research prospect profile is to help clients determine if individuals, companies, and foundations have the ability, interest, and inclination to support their organization. We provide you with key points and information necessary to craft an appeal tailored to your prospect's interests and giving history.

Key Elements of ViTreo Prospect Profiles :

Individual Prospect Profile

- **Personal Details:** Full name, age/birth date, education, contact details, spousal and immediate family details, home and/or business address
- **Biography:** Career and work history, achievements, community/business/professional affiliations (membership in professional organizations, trustee/director in public, private, non-profit, or community organizations)
- **Financial/Wealth Indicators:** Salary, shares owned and traded, assets owned, personal philanthropic funds or foundations
- **Philanthropy:** Donation history, dates and initiatives funded
- **Rankings/Recommendations:** Link to client organization, ability/capacity, interest, proposed ask amount
- **Other Relevant Data:** Awards/accolades, hobbies & interests



Corporate Research Profile

- **Linkages to Your Organization:** Donor, supplier, grantor, corporate "champion", sponsor, internships, employer, etc., and status of current relationship
- **Corporate Overview:** Background information (type of firm, key business activities, mission and values, history), management (senior management and board members; founders and owners)
- **Financials:** Total revenue, net income, total assets, market capitalization, debts, and other relevant financial indicators
- **Philanthropy:** Community investment focus, areas not funded, donation history/giving examples (date, amount, donee, initiative funded)
- **Rankings/Recommendations:** Link to client organization, ability/capacity, interest, proposed ask amount
- **Other Relevant Data:** Awards/accolades, events making the news



Foundation Research Profile

- **Introductory Details:** Name, location, contact information, registration number
- **Overview:** Background information, mission, funding interests, founders, board members/trustees
- **Financials:** Total revenue, total assets, grants given
- **Philanthropy:** Focus areas, donation history/giving examples
- **Rankings/Recommendations:** Link to client organization, ability/capacity, interest, proposed ask amount
- **Other:** Grant information, awards/accolades, events making the news

